BUSINESS LICENSE PROGRAM

SASKATOON EMPLOYMENT TRENDS

EMPLOYMENT *Profile*

City of
Saskatoon
Planning & Development Branch

Employment Profile 2009 Edition

The information presented in this report has been compiled by the City of Saskatoon, Planning and Development Branch, Business License Program.

For clarity and easy comparison, figures in this report have been rounded. All calculations have been performed on the original unrounded data.

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1.0 Introduction

The Employment Profile is an important resource for planning and business development. This report presents statistics and trends in employment in relation to the population, commuter flows, business activity and scale, industry sectors and geographic distribution across the city. This information provides policy makers, prospective developers and the business community with data to plan for future needs and services.

1.1 Employment Profile Highlights

- Total employment in Saskatoon is estimated to be 115,605.
- The three largest employment areas in Saskatoon are North West Industrial, Central Business District and University of Saskatchewan Management Area.
- Industry sectors providing the greatest proportion of the employment base are retail trade, educational services, health and social services, and manufacturing.
- Employment opportunities in Saskatoon are growing at a faster rate than the population.
- The University Heights, Nutana and North West Industrial suburban development areas have seen the greatest percentage increase in total employment since 2006.
- Over the past ten years, part-time employment has remained relatively stable, while there has been a steady increase in full-time employment.
- Saskatoon experiences a daily net inflow of 7,900 workers from surrounding communities to fill the number of full-time and part-time positions within Saskatoon's city limits.
- Eighty-five percent of Saskatoon's employed labour force lives and works in Saskatoon.
- City Park, Nutana and Central Business District have the greatest number of people that live and work in the same neighbourhood.
- Eighty-five percent of commuters in Saskatoon travel to work by private vehicle.
- Since 2001, the number of commercial businesses, home based businesses and institutional agencies in Saskatoon have grown steadily.
- Seventy percent of the businesses in Saskatoon employ fewer than ten people.

1.2 Definitions

Census adjustment takes into consideration the difference between employment figures collected by the City of Saskatoon and those collected by Statistics Canada in the 2006 Census. These considerations include home based employment, licensed businesses or institutional agencies reporting zero employment, errors in reporting and gaps in data collection. A more detailed explanation of the census adjustment is provided in the Methodology section of this report.

Commercial space is defined as any space where a licensed business, institutional agency or other such organization may operate, excluding residential locations.

Gross leasable floor area is the amount of space within a building used by the business operation.

Institutional agency refers to any organization that is not required to obtain a City of Saskatoon commercial business license, but occupies commercial, industrial or institutional space within the city. Examples of institutional agencies include provincial and federal government agencies, Saskatoon Health Region facilities, educational facilities, urban reserve properties, charitable and non-profit groups, etc.

Labour force refers to the population 15 years and older that are either employed or unemployed. The employed are persons having a job or business, whereas the unemployed are without work, are available for work and are actively seeking work (Statistics Canada 2009).

Licensed business refers to any business located within Saskatoon city limits holding a valid City of Saskatoon business license. In accordance with Business License Bylaw 8075, all businesses operating from a physical location within Saskatoon require a City of Saskatoon business license. This applies to all for-profit commercial, industrial and home based businesses in a permanent or fixed location.

North American Industry Classification System (NAICS) is a comprehensive system of categorizing businesses by type which was developed by the statistical agencies of Canada, the United States and Mexico to provide a common statistical framework and reporting standard to facilitate the comparative analysis of the three economies (Statistics Canada 2007a).

Total employment is the sum of full-time and part-time employment.

> **Full-time employment** consists of persons who usually work 30 hours or more per week at their main or only job (Statistics Canada 2009).
>
> **Part-time employment** consists of persons who usually work less than 30 hours per week at their main or only job (Statistics Canada 2009).

2.0 Methodology

The Planning and Development Branch gathers land use information through the City of Saskatoon's Business License Program to facilitate planning and business decisions, and provide for orderly development in Saskatoon. The Business License Program has been collecting data since 1997 through the issuance of business licenses to all for-profit commercial, industrial and home based businesses in accordance with development policies and standards set out in Business License Bylaw 8075, License Bylaw 6066, Zoning Bylaw 8770 and Official Community Plan Bylaw 8769.

The Business License Program maintains a commercial space inventory of licensed businesses; however, prior to 2003 the database did not accurately portray employment and business trends across the city. Because the City does not license non-profit organizations, government agencies or educational institutions, a large gap was left in the statistical representation of the employment sector.

In 2003, a capital project was initiated to develop and implement new strategies to improve commercial space database development and statistical reporting. Through the use of many internal and external resources, a comprehensive land use inventory of all commercial and industrial space was compiled. The non-licensed businesses, or institutional agencies, not captured through the licensing process were surveyed, and continue to be surveyed every other year, to collect key statistical data that is consistent with information collected from licensed businesses.

2.1 Data Collection

A property-based method is used to gather employment information from all licensed businesses and institutional agencies occupying commercial space in Saskatoon. All data collected is recorded by location. This approach allows a geographic analysis of employment by neighbourhood and suburban development area.

Employment data is collected in two ways:

1. Licensed businesses self-report the total number of full-time and part-time employees on an annual basis through the business license application and renewal process.
2. All institutional agencies occupying commercial space are surveyed to collect their location, number of full-time and part-time employees, and gross leasable floor area.

Institutional agencies were initially identified through a site-by-site review of all commercial properties in Saskatoon. Because it is not feasible to perform this comprehensive review on an ongoing basis, identifying new agencies can be challenging. Often, they are identified through newspaper articles or by chance during routine site inspections prompted by new business license applications.

Through this site-by-site review a number of businesses were identified to be utilizing more than one tenant space or unit and, in some cases, more than one site. Recording this information is difficult as technical systems only allow each licensed business or institutional agency to be linked to one site and one unit within a structure. This is also problematic in trying to report the number of vacant units. Although a unit may appear vacant in our system, it could be utilized by an adjacent business.

To improve reporting and analysis capabilities, the North American Industry Classification System (NAICS) was implemented across both the licensed business and institutional agency workflows. This classification system provides for a standardized reporting method by classifying each type of business activity using a widely recognized statistical system (Statistics Canada 2007a). This allows for reporting of different industry sectors that can be directly compared with Statistics Canada data. Workflows currently allow for assignment of only one NAICS designation per licensed business or institutional agency based on the primary activity of the business. This may not effectively represent those licensed businesses or institutional agencies that are diverse in their business activities.

2.2 Data Analysis

The Employment Profile presents data collected by the City of Saskatoon from 2006 to 2009. As a benchmark for comparison, the 2006 City of Saskatoon data is used in the bulk of the report to coincide with Statistics Canada's 2006 Census. Although Statistics Canada collected the Census data in 2006, detailed data for labour, place of work and commuting to work were not released until the spring of 2008. Data is analyzed and compared with the Census information, acknowledging that the Census counts the population of Saskatoon and their characteristics, while the City of Saskatoon data counts the number of employees at each business location in Saskatoon regardless of the location of their residence.

Based on data reported in the 2006 Census, total employment in Saskatoon can be estimated at 115,605. The combined total of part-time and full-time employment reported to the City of Saskatoon from individual licensed businesses and institutional agencies in 2006 is 100,697. During analysis, a number of factors were identified that must be considered and accounted for in order to effectively compare to the results of the Census.

These factors include accounting for home based employment, licensed businesses or institutional agencies reporting zero employment, errors in reporting and gaps in data collection. Collectively these factors are referred to as a Census adjustment for the purpose of this report.

Home Based Business Employment

Home based employment was not included in the employment figure compiled by the City of Saskatoon due to inconsistencies in data collection. Home based businesses are only permitted to have one non-resident employee at the business address; however, they can employ as many people off-site as they wish. Because all data is recorded at the business address, home based employment distribution is not accurately portrayed. The Business License Program recently implemented new data collection methods for home based business statistics so future reporting capabilities can be expanded to accurately reflect home based business employment.

Based on the information available from licensed home based businesses, each home based business employs an average of 2.7 employees. This figure was determined by calculating a four-year average of the number of employees per home based business. The number of licensed home based businesses in 2006 was 2,205, resulting in an additional 5,954 employees.

Inaccurate Employment Reporting

Licensed businesses and institutional agencies are relied on to self-report employment and gross leasable floor area. In most cases, businesses and agencies update this information to the best of their knowledge, but there are some that report zero and others that have not updated their statistics after their initial application as a new business. Although it is difficult to identify which licensed businesses and institutional agencies have not updated their statistical information, we are able to easily identify those that have reported zero. Extra effort is made to collect this information from those that have been identified.

Licensed businesses and institutional agencies reporting zero employees need to be factored into the total employment figure for accurate comparison to the Census data. In 2006, 2.5% of licensed businesses and institutional agencies were listed with zero employees. This result can occur when there are no employees, when employees are already counted on an alternate site or because of a non-response to the institutional survey or business license application question. Excluding those that are counted elsewhere or are intentionally zero, the employment of 1.5% of businesses and agencies are unaccounted for. Not including the 1.5% of businesses that did not report employment, the average number of employees per establishment is 16.9. This accounts for an estimate of 1,521 additional employees.

Margin of Error

There are several other factors that contribute to a general undercount of total employment which are much more difficult to estimate. These factors include counting seasonal employment, home based institutional agencies, errors in self-reporting, failure to update employment figures, as well as any institutional agencies, home based or commercial businesses not captured through the licensing program or survey. This results in a margin of error estimated to be 6.6% after considerations have been made for home based business employment and licensed businesses or institutional agencies that have reported zero employment.

3.0 Employment Data

This section includes employment data for the City of Saskatoon based on the Business License Program and institutional agency survey information collected in 2006 and Statistics Canada figures from the 2006 Census.

3.1 Census Comparison

In Saskatoon, total surveyed employment in 2006 was 100,965. This data was gathered from 5,325 licensed commercial businesses and 740 institutional agencies. When licensed home based business employment is accounted for and the total is adjusted to compensate for the margin of error in the data, total employment is estimated to be 115,605[1].

Employment data collected by Statistics Canada in the 2006 Census of Saskatoon's population and participating labour force, combined with data collected by the City of Saskatoon is shown in Table 1. With total employment estimated at 115,605 and a population of 202,340, Saskatoon has an employment ratio of 0.57. This means that there are 57 local jobs per 100 residents of Saskatoon. Considering the employed labour force of 107,705 Saskatoon residents, approximately 7,900 employees are needed from surrounding communities to fill the number of full-time and part-time positions accounted for within Saskatoon's city limits.

Table 1: Total Employment, Census Population and Labour Force Activity, 2006

Employment collected by the City of Saskatoon	100,965
Census adjustment [a]	14,640
Total employment	115,605
Total population	202,340
Participating labour force	114,025
Employed labour force	107,705
Unemployed labour force	6,320
Employment ratio [b]	0.57
Difference between total employment and participating labour force	1,580
Labour import [c]	7,900

[a] This figure is an estimate of home based employment and accounts for a margin of error.

[b] Employment ratio is total employment divided by the total population.

[c] Labour import refers to the total employment positions minus the employed labour force.

Source: Statistics Canada, 2006 Census of Population

[1]This figure includes an estimate of home based business employment, employment for businesses or agencies that reported zero and takes into account the margin of error. Further detail is provided in the Methodology section of this report.

Census data on commuter flows to and from the city indicate that Saskatoon experiences a net inflow of 7,900 workers on a daily basis (Statistics Canada 2008). This is a result of 12,425 people coming to work in Saskatoon from other municipalities and 4,525 Saskatoon residents leaving the city to work elsewhere. Of the inbound commuters, the greatest percentages travel to work in Saskatoon from the Rural Municipality of Corman Park, Martensville and Warman, respectively. The greatest percentages of outbound commuters travel from their residence in Saskatoon to work in the Rural Municipality of Corman Park, Martensville, and Vanscoy, respectively. Maps 1 and 2 illustrate Saskatoon's inbound and outbound commuter flows.

Map 1: Inbound Commuter Flows, 2006 Census *(See attached fold-out following page 8)*

Map 2: Outbound Commuter Flows, 2006 Census *(See attached fold-out following page 8)*

Meanwhile, 91,890 people choose to live and work in Saskatoon (Statistics Canada 2007b). This accounts for 85% of Saskatoon's employed labour force. This figure includes those that work at home, but does not include those with no fixed workplace address. Nine percent of Saskatoon's employed labour force does not have a fixed workplace address. Construction workers are an example of those in the labour force with no fixed workplace. We can assume that a large portion of these people will provide the majority of their work in Saskatoon, potentially bringing the number of people that live and work in Saskatoon to 100,000. A breakdown of place of work is demonstrated in Table 2.

Table 2: Place of Work, 2006 Census

Place of work status	Saskatoon			Saskatchewan		
	Total	Male	Female	Total	Male	Female
Total employed labour force	107,705	55,340	52,370	494,900	261,355	233,545
Worked at usual place	92,235	45,350	46,885	375,185	179,095	196,090
Worked in municipality of residence	86,615	41,575	45,040	265,680	122,885	142,790
Worked in different municipality within the same census division of residence	2,295	1,490	805	75,250	36,775	38,465
Worked in a different census division	2,405	1,625	785	24,305	13,335	10,965
Worked in a different province	920	660	260	9,955	6,095	3,860
No fixed workplace address	9,895	7,500	2,390	49,025	39,465	9,555
Worked at home	5,275	2,275	3,000	69,650	42,105	27,545
Worked outside Canada	300	210	90	1,040	685	355

Source: Statistics Canada, 2006 Census of Population

According to the Census data on place of work in Table 2, 86,615 Saskatoon residents travel to a regular workplace in Saskatoon. This figure does not include those that work at home. Of those 86,615 people that travel to a usual place of work in the city, only 4% work in the same neighbourhood in which they live (Statistics Canada 2008). City Park, Nutana and Central Business District, respectively, have the greatest number of people that live and work in the same neighbourhood.

Of those that live in Saskatoon and must travel to their place of work, the large majority (85%) travel by car, truck or van. This figure includes 8% that travel in the vehicle as a passenger. Nine percent walked or cycled, 4% took public transit and 2% travel by some other mode of transportation. Table 3 outlines mode of transportation to work.

Table 3: Mode of Transportation to Work, 2006 Census

Mode of transportation to work	Saskatoon				Saskatchewan			
	Total		Male	Female	Total		Male	Female
Total employed labour force with a usual place of work or no fixed workplace address	102,130	(100%)	52,850	49,280	424,210	(100%)	218,565	205,645
Car, truck, van, as driver	79,120	(77%)	41,840	37,280	336,325	(79%)	178,305	158,020
Walked or bicycled	9,210	(9%)	4,930	4,275	40,755	(10%)	18,975	21,780
Car, truck, van, as passenger	7,895	(8%)	3,340	4,555	30,760	(7%)	13,115	17,640
Public transit	4,300	(4%)	1,580	2,725	9,300	(2%)	3,590	5,710
All other modes	1,600	(2%)	1,160	435	7,070	(2%)	4,570	2,500

Source: Statistics Canada, 2006 Census of Population

3.2 Total Employment

Subsequent sections of this report analyze only the employment information collected from licensed commercial businesses and institutional agencies, and does not include modifications made for comparison with the 2006 Census.

Employment by Suburban Development Area

Long range planning in Saskatoon is organized within the context of suburban development areas. There are eight suburban development areas across Saskatoon, but for a better understanding of business and employment characteristics, the two neighbourhoods with the greatest employment have been subdivided from their suburban development area to be considered independently. Central Business District will stand alone from the Core Neighbourhood Area and U of S Management Area will be considered separately from University Heights suburban development area. Appendix A on page 33 outlines the suburban development area boundaries in Saskatoon.

Figure 1 summarizes total employment by suburban development area. Areas with the greatest total employment are North West Industrial (24%), Central Business District (16%) and U of S Management Area (14%). Collectively, these three suburban development areas represent 54% of Saskatoon's total employment. Employment distribution by neighbourhood is shown on Map 3.

Of note, much of the land in the Blairmore suburban development area was annexed by the City of Saskatoon in 2005; therefore, there is no employment data available for 2006.

Map 1: Inbound Commuter Flows, 2006 Census

Commuters to Saskatoon	Location
1870	Martensville
1400	Warman
470	Dalmeny
280	Langham
235	Delisle
235	Osler
190	Prince Albert
180	Dundurn
140	Asquith
130	Aberdeen
125	Regina
105	Allan

Inbound Commuter Flows 2006

- 0 - 130
- 131 - 375
- 376 - 950
- 951 - 1496
- 1497 - 1870

RM Inbound Saskatoon

- 0 - 200
- 201 - 400
- 401 - 600
- 601 - 800
- 801 - 1000
- 1001 - 1200
- 1201 - 1400
- 1401 - 1600
- 1601 - 1800
- 1801 - 2000
- 2001 - 2200
- 2201 - 2400
- 2401 - 2600
- 2601 - 2800
- 2801 - 3000

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Source: Statistics Canada, 2006 Census

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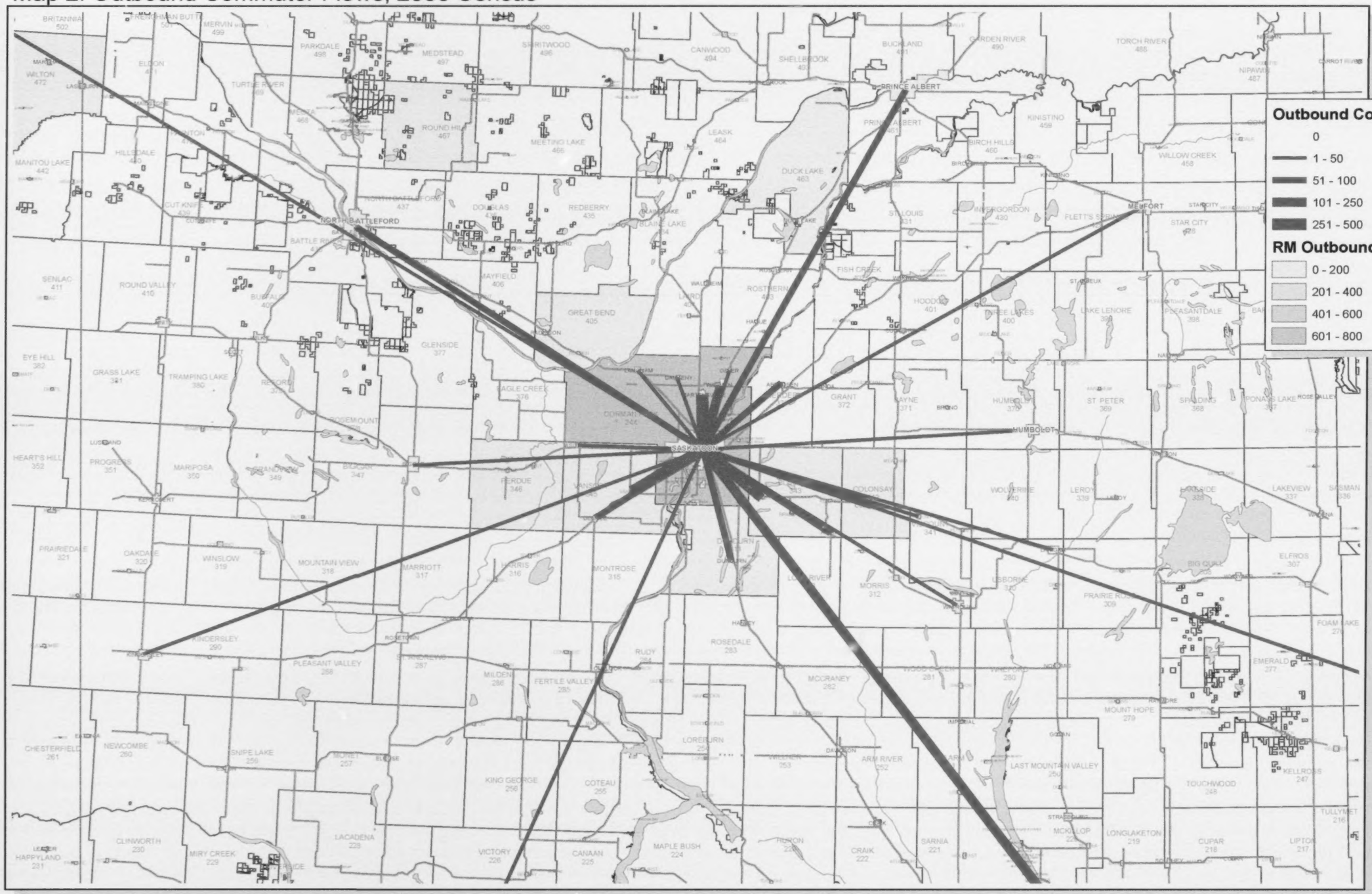
Map 2: Outbound Commuter Flows, 2006 Census



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Source: Statistics Canada, 2006 Census

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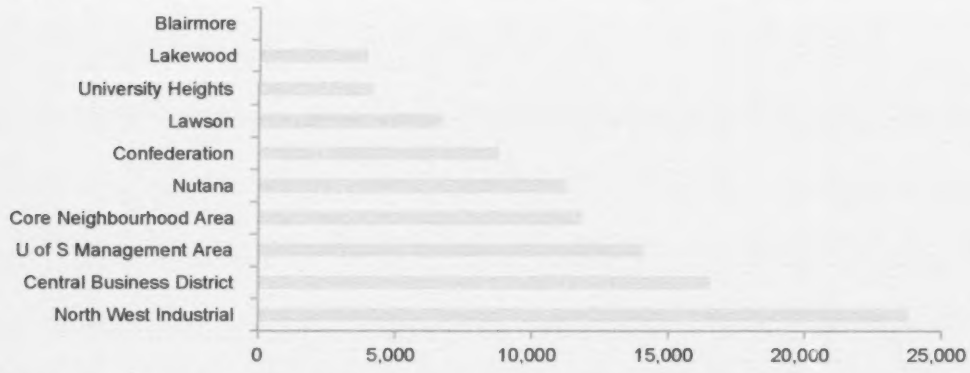
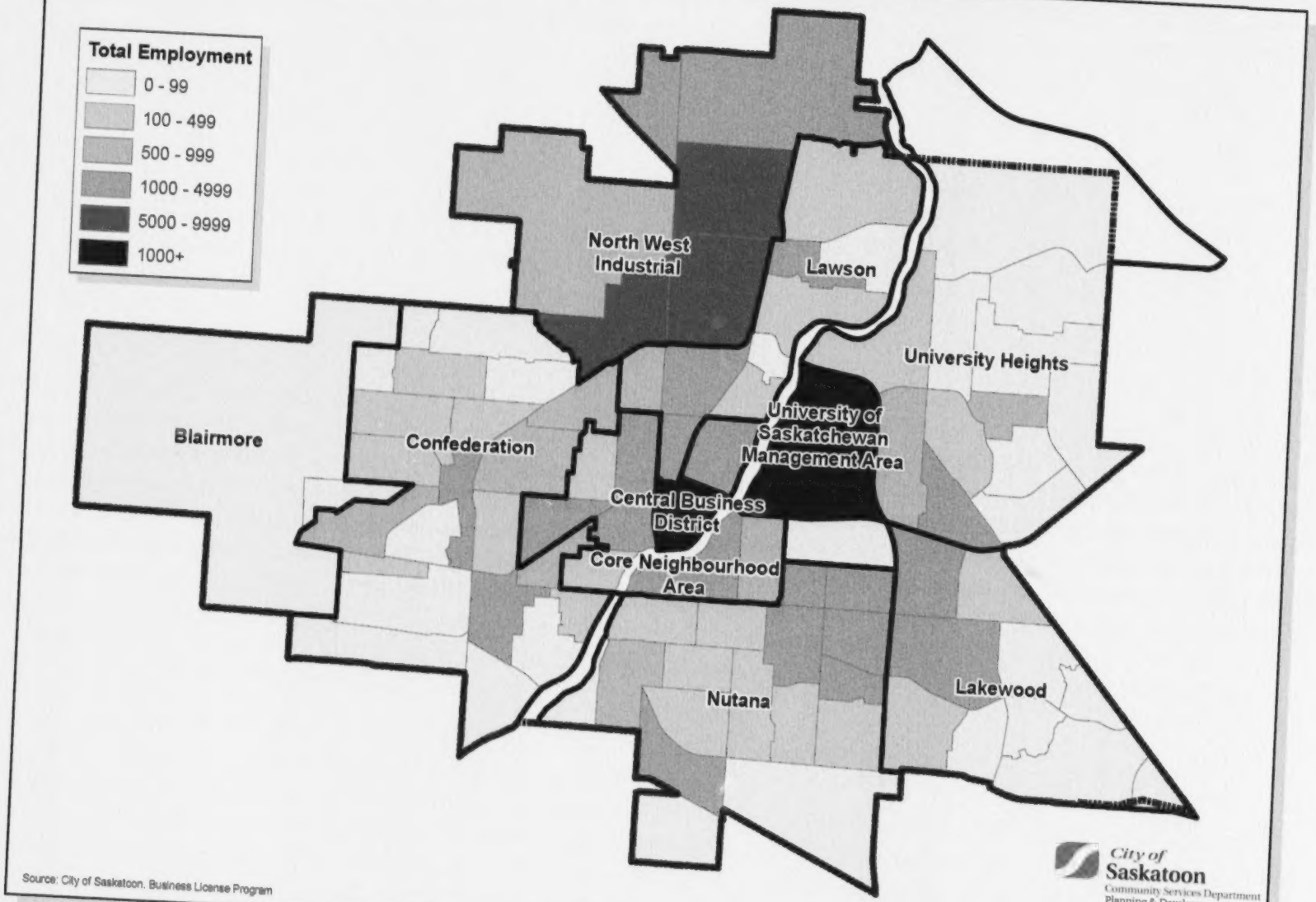
Figure 1: Employment by Suburban Development Area, 2006



Source: City of Saskatoon, Business License Program, 2006

Map 3: Distribution of Total Employment, 2006



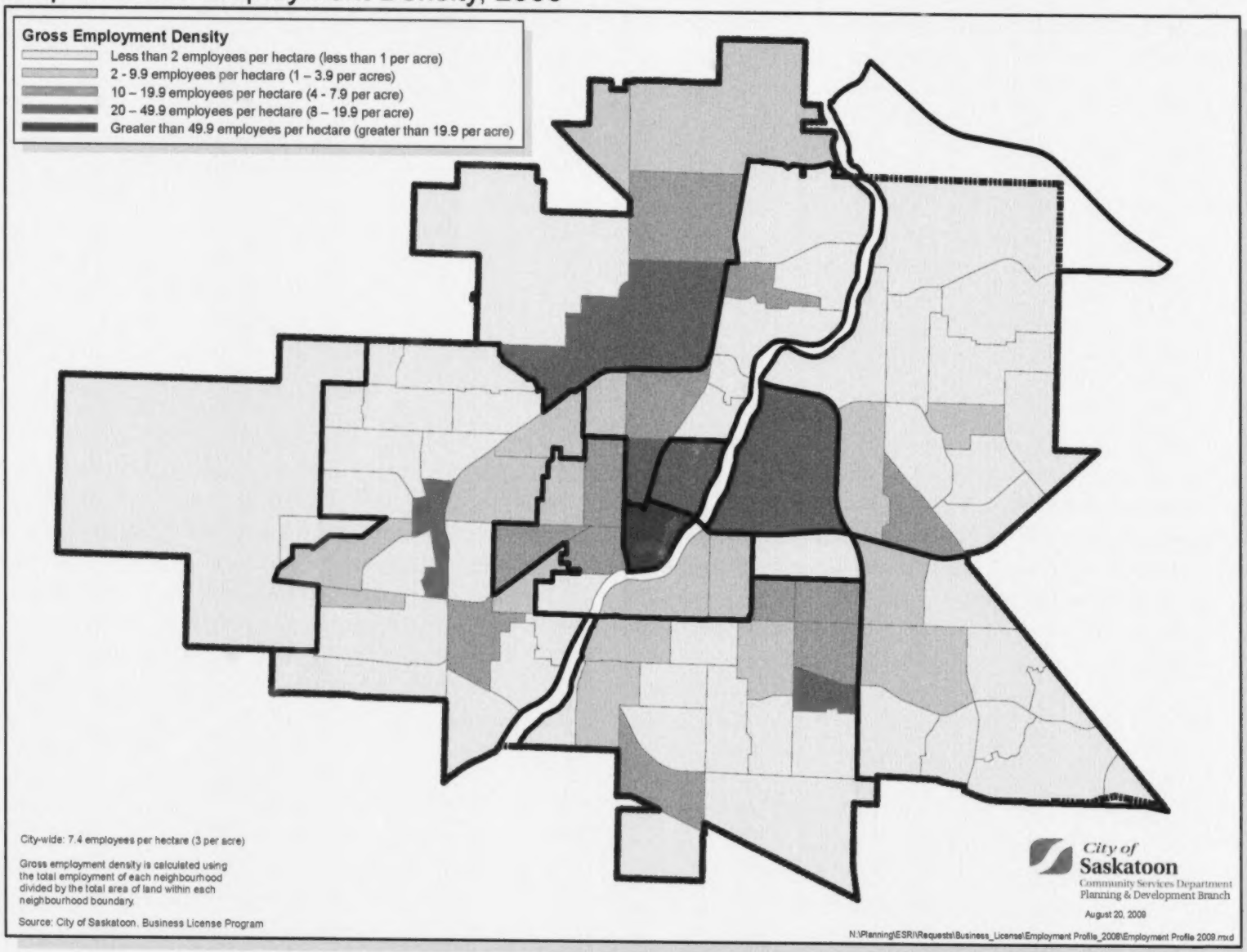
Employment Density

Employment density refers to the concentration of employment in a given area, using the total employment of each neighbourhood and the geographic area of that neighbourhood in acres or hectares. Neighbourhood area has been calculated in two ways, by gross area and net area. Employment density by neighbourhood for both gross and net density is available in Appendix B on page 34.

Gross area includes all land within each neighbourhood boundary. Overall, the city's average gross employment density is 7.4 employees per hectare (3 per acre). Neighbourhoods with the highest gross employment density are Central Business District with 141 employees per hectare, followed by City Park with 33 and U of S Management Area with 28. Central Business District and U of S Management Area are primarily composed of commercial and institutional development and as one would expect, have high employment densities. City Park, although it contains a significant amount of residential development, is a mixed use neighbourhood. This industrial, commercial and institutional area, including City Hospital, accounts for City Park's high gross employment density. Neighbourhoods with the lowest gross employment densities are primarily residential or undeveloped. Map 4 illustrates gross employment density across Saskatoon by neighbourhood.

Net area includes only lands developed for commercial, industrial, public institutional and educational uses. Property uses excluded are residential, parks, walkways, roadways, buffer strips, utility stations, cemeteries, golf courses, churches and undeveloped commercial properties. The city's average net employment density is 43.4 employees per hectare (17.6 per acre). The neighbourhoods with the highest net employment density are Central Business District with 369 employees per hectare, followed by Pleasant Hill with 180 and City Park with 160. Both Pleasant Hill and City Park have a mix of land uses and each contains a hospital which generates significant employment. Net employment density by neighbourhood can be seen in Map 5.

Map 4: Gross Employment Density, 2006


Gross Employment Density
Less than 2 employees per hectare (less than 1 per acre)
2 - 9.9 employees per hectare (1 – 3.9 per acres)
10 – 19.9 employees per hectare (4 - 7.9 per acre)
20 – 49.9 employees per hectare (8 – 19.9 per acre)
Greater than 49.9 employees per hectare (greater than 19.9 per acre)
City-wide: 7.4 employees per hectare (3 per acre)
Gross employment density is calculated using the total employment of each neighbourhood divided by the total area of land within each neighbourhood boundary.
Source: City of Saskatoon, Business License Program
City of Saskatoon
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August 20, 2009
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Map 5: Net Employment Density, 2006

Net Employment Density
Less than 25 employees per hectare (less than 10 per acre)
25 – 49.9 employees per hectare (10 – 19.9 per acre)
50 – 74.9 employees per hectare (20 – 29.9 per acre)
75 – 99.9 employees per hectare (30 – 39.9 per acre)
Greater than 99.9 employees per hectare (greater than 39.9 per acre)
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City-wide 43.3 employees per hectare (17.6 per acre)

Net employment density is calculated using the total employment of each neighbourhood divided by the total area of employment lands for that neighbourhood. Employment land uses include those developed for commercial, industrial, public institutional and school uses. Land uses excluded are residential, parks, walkways, roadways, buffer strips, utility stations, cemeteries, golf courses, churches and undeveloped commercial properties.

Source: City of Saskatoon, Business License Program

Full-Time and Part-Time Employment

In Saskatoon, 77% of jobs are full-time and 23% are part-time. The North West Industrial area contains 25% of the city's total full-time employment, followed by U of S Management Area with 17% and Central Business District with 16%. The greatest percentage of the city's total part-time employment is found in the Nutana suburban development area at 19%, followed by North West Industrial and Central Business District each with 18%.

Suburban development areas with the greatest proportions of full-time employment are U of S Management Area (94%), North West Industrial (82%) and Core Neighbourhood Area (78%). Those with the greatest proportions of part-time employment are Nutana (39%), Lakewood (38%) and Lawson (33%). As expected, a higher proportion of full-time employment is found in areas that are primarily commercial or industrial. Employment in residential areas is largely accounted for by the retail and food service sectors which, by nature, tend to offer a greater proportion of part-time positions than full-time positions.

3.3 Businesses

In 2006, there were 6,065 businesses operating in Saskatoon. This includes all licensed commercial businesses and institutional agencies operating in institutional, commercial, industrial and specialized zoning districts. Data was collected from 5,325 licensed commercial businesses and 740 institutional agencies.

This section breaks down the number of business in Saskatoon by suburban development area, number of employees and industry sector.

Businesses by Suburban Development Area

Suburban development areas with the highest proportion of licensed businesses and institutional agencies are North West Industrial with 28%, followed by Central Business District with 19% and Core Neighbourhood Area with 15% of the total number of businesses. Of note, areas with the highest concentration of institutional agencies correlate with the highest concentration of licensed businesses. All three areas offer a significant stock of office and industrial space. Although rent and property values are, in most cases, considerably higher in the Central Business District, the downtown area continues to be one of the most desirable locations for businesses.

Table 4 and Figure 2 provide a summary of businesses and institutional agencies by suburban development area.

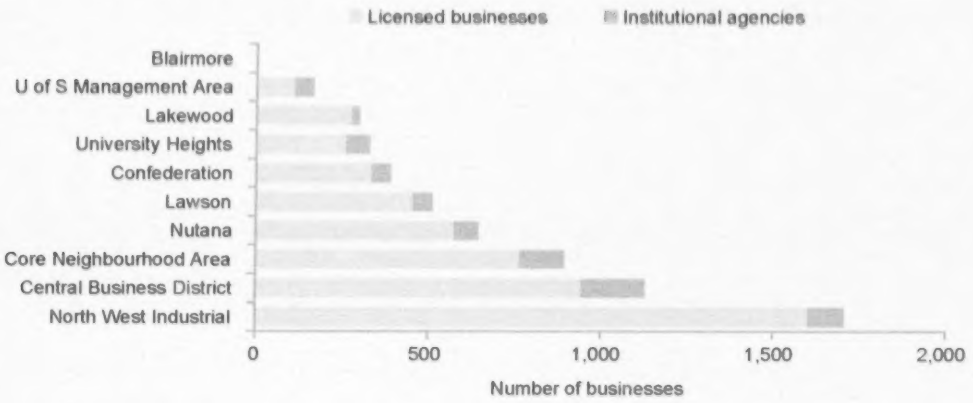
Table 4: Businesses by Suburban Development Area, 2006

Suburban development area	Licensed businesses	Institutional agencies	Total businesses	
North West Industrial	1,600	105	1,705	(28%)
Central Business District	945	180	1,130	(19%)
Core Neighbourhood Area	765	130	895	(15%)
Nutana	575	70	645	(11%)
Lawson	455	55	510	(8%)
Confederation	335	55	390	(6%)
University Heights	260	70	325	(5%)
Lakewood	275	20	300	(5%)
U of S Management Area	110	55	165	(3%)
Blairmore	0	0	0	(0%)
Totals	5,325	740	6,065	(100.0%)

*Numbers may not add due to rounding. Percentages are calculated on unrounded figures.

Source: City of Saskatoon, Business License Program, 2006

Figure 2: Businesses by Suburban Development Area, 2006



Source: City of Saskatoon, Business License Program, 2006

Businesses by Number of Employees

Saskatoon's business community is primarily made up of small businesses. Forty-six percent of all businesses have less than five employees, while another 24% have between five and nine employees. In total, 70% of the businesses in Saskatoon employ fewer than ten employees.

Although almost three-quarters of the businesses in Saskatoon employ fewer than ten employees, this makes up only 16% of total employment. Businesses employing between 20 and 49 employees have the greatest percentage of total employment representing approximately 19%.

Table 5 provides a summary of the number of businesses by employment range for each suburban development area. Figure 3 demonstrates the percentage of total businesses by employment range.

Table 6 presents a summary of the number of employees by employment range for each suburban development area. Figure 4 illustrates the percentage of total employment by employment range. It is apparent that mid-sized businesses with between 20 and 299 employees represent the largest proportion of the employment base with approximately 48% of total employment.

While businesses with 300 or more employees only account for 0.5% of the total number of businesses in Saskatoon, they represent 26% of the employment base. Map 6 shows the geographic distribution of businesses with 300 or more employees. A list of the businesses which employ 300 or more can be found in Appendix C on page 37.

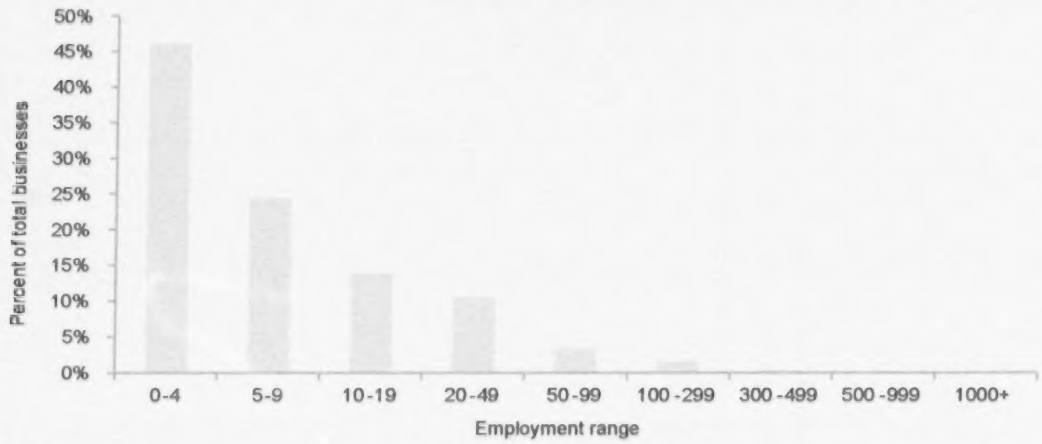
Table 5: Number of Businesses by Employment Range and Suburban Development Area, 2006*

Suburban development area	Business size (based on number of employees)									
	0-4	5-9	10-19	20-49	50-99	100-299	300-499	500-999	1000+	Total
North West Industrial	720	420	265	215	60	20	2	2	0	1,705
Central Business District	595	260	125	85	35	20	6	2	0	1,130
Core Neighbourhood Area	460	215	130	60	15	7	2	0	2	895
Nutana	255	165	95	65	40	15	3	0	0	645
Lawson	240	130	65	55	10	10	0	1	0	510
Confederation	160	90	60	50	10	10	2	2	1	390
University Heights	150	75	40	45	10	4	0	0	0	325
Lakewood	140	85	30	30	6	3	2	0	0	300
U of S Management Area	75	35	15	20	10	10	0	0	2	170
Blairmore	0	0	0	0	0	0	0	0	0	0
Total businesses	2,800	1,475	840	630	200	95	15	7	5	6,065
Percent of total businesses	46%	24%	14%	10%	3%	2%	0.3%	0.1%	0.1%	100%

*Numbers may not add due to rounding. Percentages are calculated on unrounded figures.

Source: City of Saskatoon, Business License Program, 2006

Figure 3: Percentage of Businesses by Employment Range, 2006



Source: City of Saskatoon, Business License Program, 2006

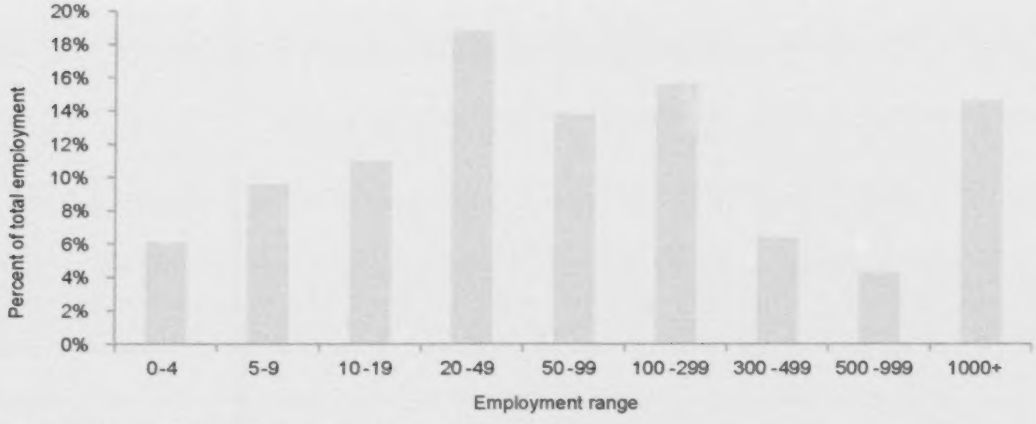
Table 6: Number of Employees by Employment Range and Suburban Development Area, 2006*

Suburban development area	Business size (based on number of employees)									
	0-4	5-9	10-19	20-49	50-99	100-299	300-499	500-999	1000+	Total
North West Industrial	1,600	2,775	3,505	6,325	4,065	3,585	600	1,340	0	23,795
Central Business District	1,210	1,715	1,710	2,525	2,235	3,245	2,475	1,385	0	16,495
U of S Management Area	160	215	225	675	525	1,800	0	0	10,505	14,100
Core Neighbourhood Area	985	1,415	1,685	1,890	1,085	1,030	700	0	3,005	11,795
Nutana	620	1,065	1,275	2,045	3,100	2,020	1,105	0	0	11,230
Confederation	360	590	810	1,610	840	1,575	720	1,015	1,250	8,770
Lawson	580	820	910	1,685	775	1,365	0	575	0	6,705
Universtiry Heights	325	490	525	1,335	830	655	0	0	0	4,160
Lakewood	350	585	415	875	430	435	825	0	0	3,915
Blairmore	0	0	0	0	0	0	0	0	0	0
Total employees	6,190	9,665	11,065	18,950	13,890	15,715	6,420	4,310	14,760	100,965
Percent of total employees	6%	10%	14%	19%	14%	16%	6%	4%	15%	100%

*Numbers may not add due to rounding. Percentages are calculated on unrounded figures.

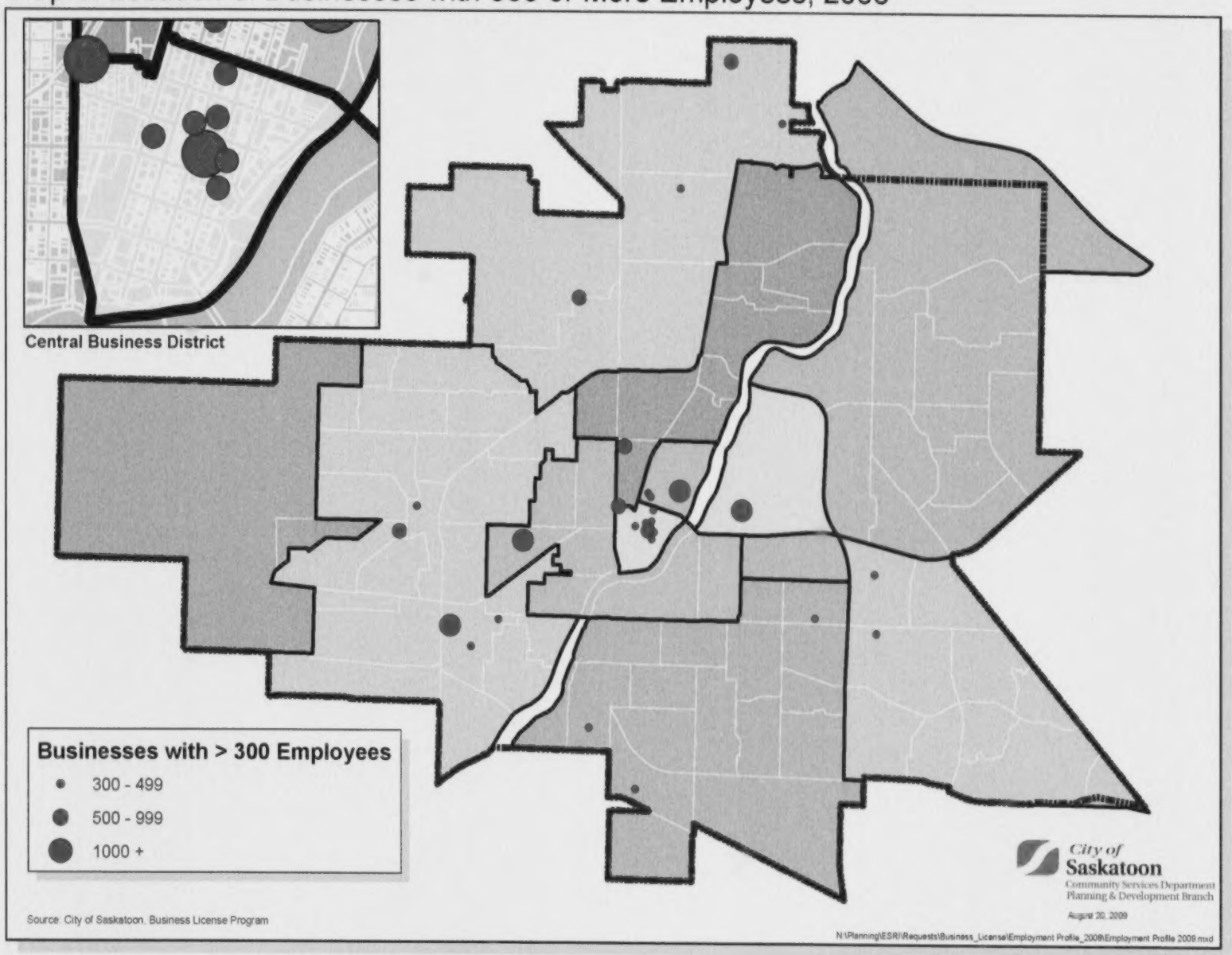
Source: City of Saskatoon, Business License Program, 2006

Figure 4: Percentage of Employees by Employment Range, 2006



Source: City of Saskatoon, Business License Program, 2006

Map 6: Location of Businesses with 300 or More Employees, 2006



Businesses and Employment by Industry Sector

Businesses can be divided into two major sectors: goods-producing and services-producing. Saskatoon's economy is primarily made up of businesses in the services-producing sector and employment is also greatest in this sector. These two major sectors can be further subdivided to categorize businesses by their primary activity. All licensed businesses and institutional agencies have been classified according to the North American Industry Classification System (NAICS) (Statistics Canada 2007a). Appendix D on page 38 defines each of the different NAICS sectors. Table 7 summarizes the distribution of employees and businesses by both goods-producing and services-producing industry sectors.

The retail trade and other services sectors have the largest number of businesses in Saskatoon, accounting for 35% of total businesses; however, these two sectors account for only 19% of total employment. Industry sectors providing the greatest proportion of the employment base are retail trade, educational services, health and social services, and manufacturing respectively. Together, these four sectors provide 49% of total employment. Figures 5 and 6 illustrate the number of businesses and employees by industry sector.

Figure 7 illustrates total employment by comparing the top four industry sectors by employment range. The breakdown of total employment by business size demonstrates differences between each of the four industry sectors. The retail trade sector makes up the largest portion of the employment base with many small to mid-size businesses with less than 100 employees. Educational services[2] and health care and social assistance similarly have large proportions of total employment in businesses with greater than 1000 employees. A large portion of employment in the educational services sector is also found in businesses with an employment range of 20 to 50 employees. This is mainly attributed to employment in elementary and high schools across the city. The manufacturing sector employs people in all employment ranges, with the greatest proportion in businesses with between 20 and 300 employees.

The retail trade sector has the greatest concentration of businesses in Saskatoon, accounting for 21% of all business; however, employment in this sector is only 15% of total employment. This can be explained by the size of businesses in the retail trade sector, as 80% of retail businesses employ ten or fewer employees. Three suburban development areas, North West Industrial followed by Central Business District and Core Neighbourhood Area, house 56% of the retail trade businesses across Saskatoon. Retail distribution across all suburban development areas is illustrated in Map 7.

[2]All employees at the University of Saskatchewan, regardless of their primary activity, have been categorized in the educational services sector.

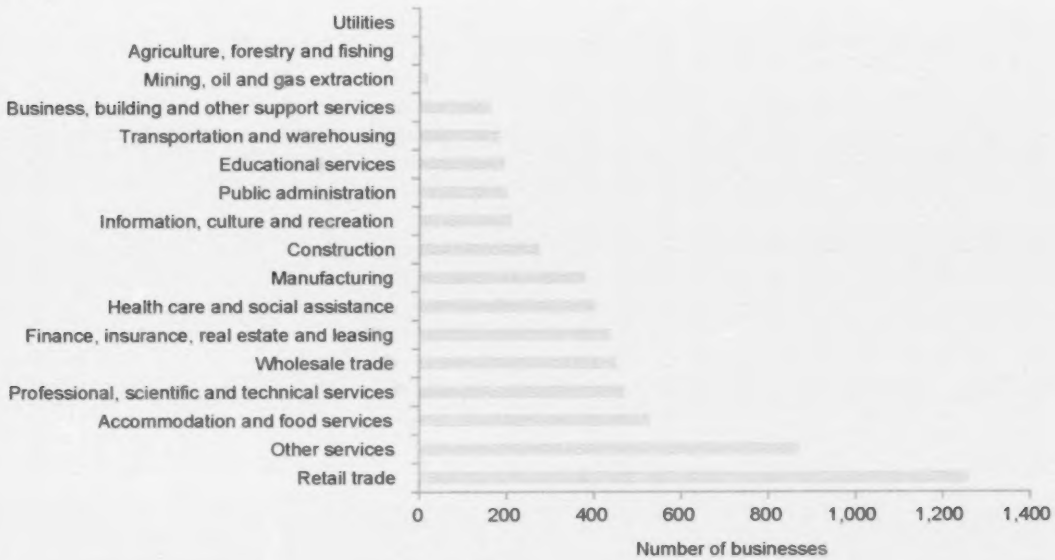
Table 7: Businesses and Employment by Industry Sector, 2006*

Industry sector	Institutional agencies	Licensed businesses	Total businesses		Institutional agency employees	Licensed business employees	Total employees	
Goods-producing sector								
Manufacturing	0	380	380	(6%)	0	10,145	10,145	(10%)
Construction	1	275	275	(5%)	0	2,740	2,740	(3%)
Mining, oil and gas extraction	0	20	20	(0.3%)	0	685	685	(0.7%)
Utilities	3	0	3	(0.0%)	225	0	225	(0.2%)
Agriculture, forestry and fishing	4	5	10	(0.1%)	15	80	95	(0.1%)
Total, goods-producing sector	**10**	**680**	**685**	**(11%)**	**240**	**13,650**	**13,890**	**(14%)**
Services-producing sector								
Retail trade	4	1,255	1,260	(21%)	50	14,640	14,690	(15%)
Educational services	120	75	195	(3%)	12,180	420	12,600	(13%)
Health care and social assistance	75	330	405	(7%)	9,860	2,115	11,975	(12%)
Accommodation and food services	5	525	530	(9%)	10	9,860	9,870	(10%)
Public administration	200	0	200	(3%)	8,535	0	8,535	(9%)
Professional, scientific and technical services	25	445	470	(8%)	230	4,805	5,035	(5%)
Other services	205	660	870	(14%)	1,880	2,915	4,795	(5%)
Finance, insurance, real estate and leasing	6	435	440	(7%)	40	4,615	4,655	(5%)
Wholesale trade	6	445	450	(8%)	80	4,395	4,475	(4%)
Transportation and warehousing	10	175	180	(3%)	740	3,015	3,760	(4%)
Information, culture and recreation	70	140	210	(4%)	1,415	2,285	3,695	(4%)
Business, building and other support services	6	160	165	(3%)	20	2,965	2,985	(3%)
Total, services-producing sector	**730**	**4,645**	**5,380**	**(89%)**	**35,050**	**52,030**	**87,080**	**(86%)**
Totals	**740**	**5,325**	**6,065**	**(100%)**	**35,290**	**65,680**	**100,965**	**(100%)**

*Numbers may not add due to rounding. Percentages are calculated on unrounded figures.

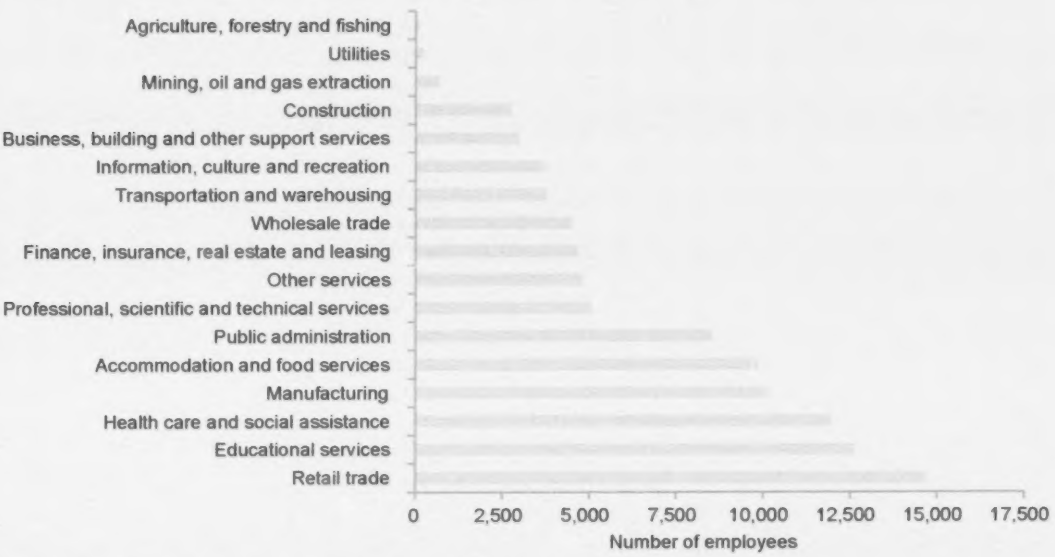
Source: City of Saskatoon, Business License Program, 2006

Figure 5: Businesses by Industry Sector, 2006



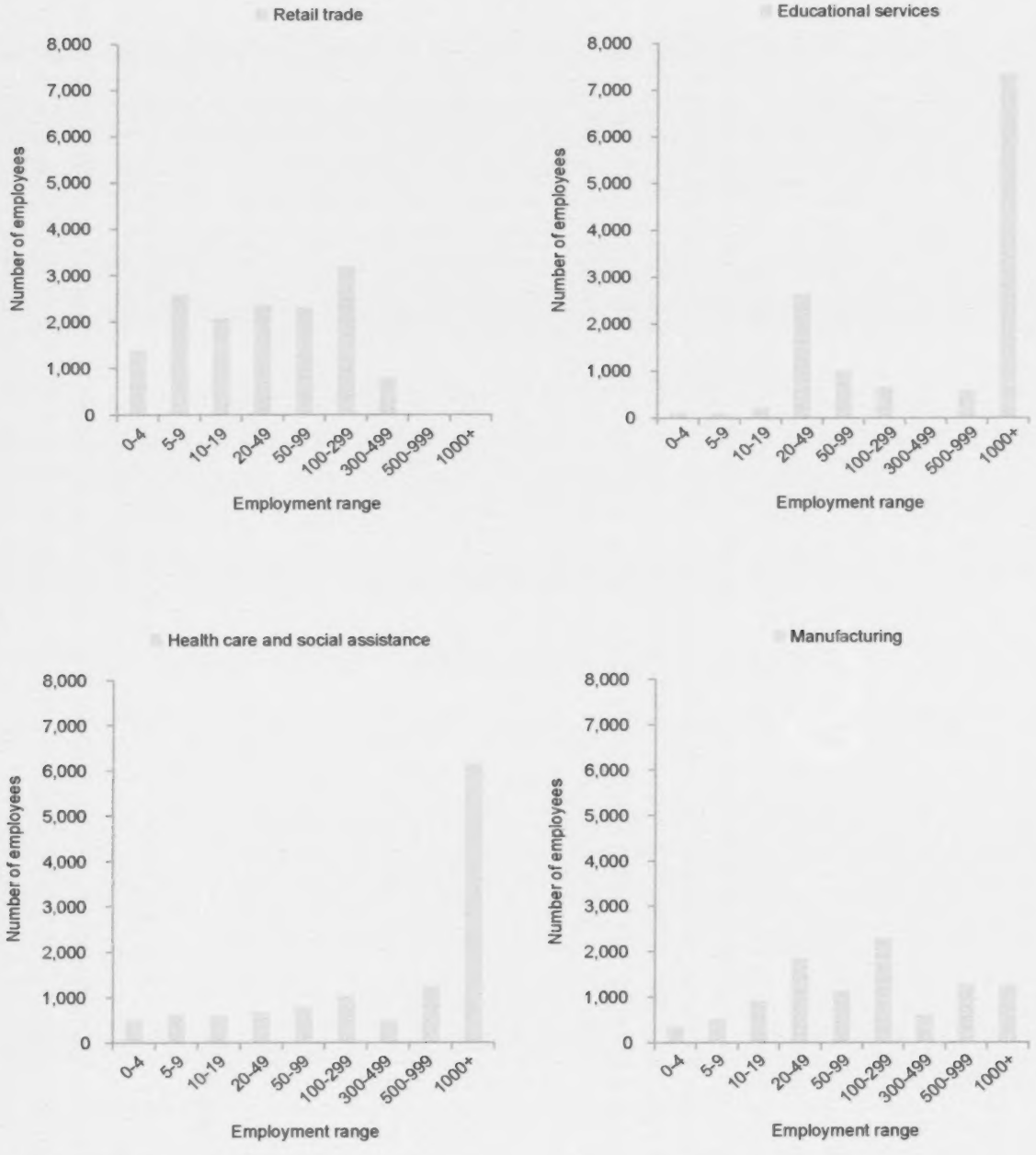
Source: City of Saskatoon, Business License Program, 2006

Figure 6: Total Employment by Industry Sector, 2006



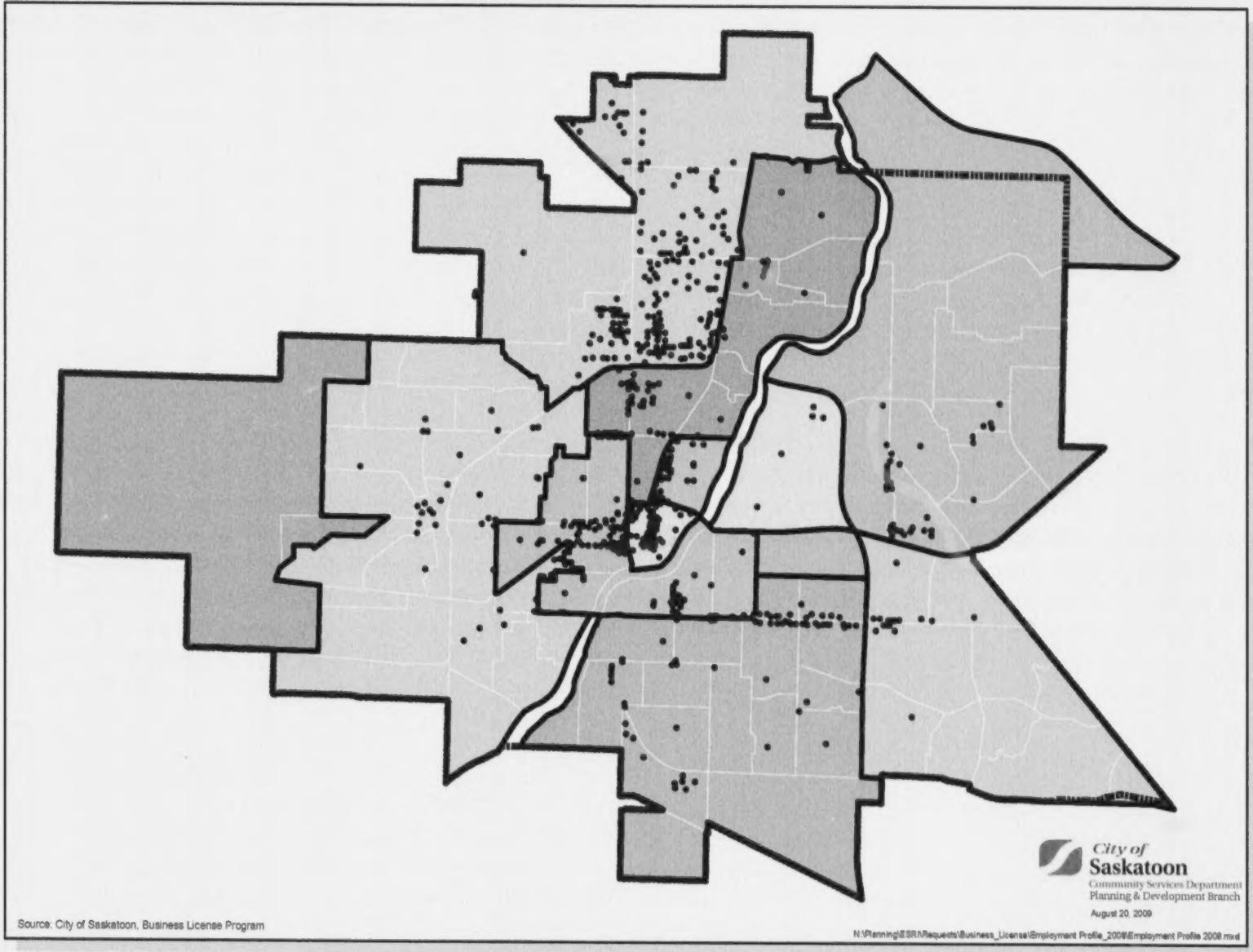
Source: City of Saskatoon, Business License Program, 2006

Figure 7: Top Employment Sectors by Employment Range, 2006



Source: City of Saskatoon, Business License Program, 2006

Map 7: Distribution of Retail Trade Sector, 2006



4.0 Trends in Employment and Business Growth

The City of Saskatoon's Official Community Plan identifies sustainability as one of its fundamental community values. A sustainable community maintains its quality of life and accommodates growth and change by balancing long term economic, environmental and social needs without limiting the ability of future generations to meet their needs.

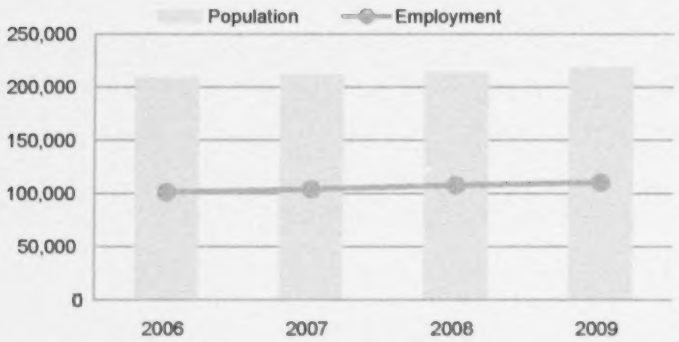
When planning for the city's future needs, there is value in considering the region-wide population, economy and employment activity. Saskatoon and the surrounding area are mutually supportive of one another and have commonalities in economic, environmental and social issues. Understanding the trends throughout the region allows for sustainable growth management through the efficient use of land and placement of infrastructure.

This section summarizes employment and business growth trends using data from 2006 to 2009 and, where possible, compares these with historic employment and population trends.

4.1 Employment and Population

Since 2006, employment in Saskatoon has continued to rise steadily as does the population. Population in Saskatoon has grown by 5%, while employment has increased at a somewhat higher rate of 9%. This growth is demonstrated in Figure 8. Employment continues to be strong in Saskatoon, according to the Labour Force Survey released by Statistics Canada on January 8, 2010. The survey shows that Saskatoon has an unemployment rate of 4.8, the lowest regional unemployment rate in all of Canada.

Figure 8: Saskatoon Employment and Population Trends, 2006-2009



Source: City of Saskatoon, Research and Mapping Group, Population Estimates December 31, 2006-2009

Comparing Census data on the population of Saskatoon and the surrounding Census metropolitan area between the years 2001 and 2006, the rate of population growth in the surrounding area has been greater than the growth within the city (Statistics Canada 2007b, 2007c). Looking ahead, population projections developed for the City of Saskatoon by Crosby Hanna and Associates in 2008 predict Saskatoon to grow by 1.0% annually reaching 256,840 by 2026. When the surrounding area is included, the population of the region is expected to reach 303,317. This population expansion predicts an increase in the proportion of seniors (age 65 and older) as a total of the population. In addition, the number of people in Saskatoon's labour force is expected to increase by 7.1%; however, the labour force in the surrounding area is likely to see an exceedingly large increase of 54.8%.

If employment opportunities continue to grow at a faster rate of increase than the population and demographics shift toward a greater proportion of seniors as a total of the population, Saskatoon will become increasingly reliant on the labour force in the surrounding area to fill the number of jobs within the city. This increased dependency further reinforces the need for a regional planning approach.

4.2 Employment by Suburban Development Area

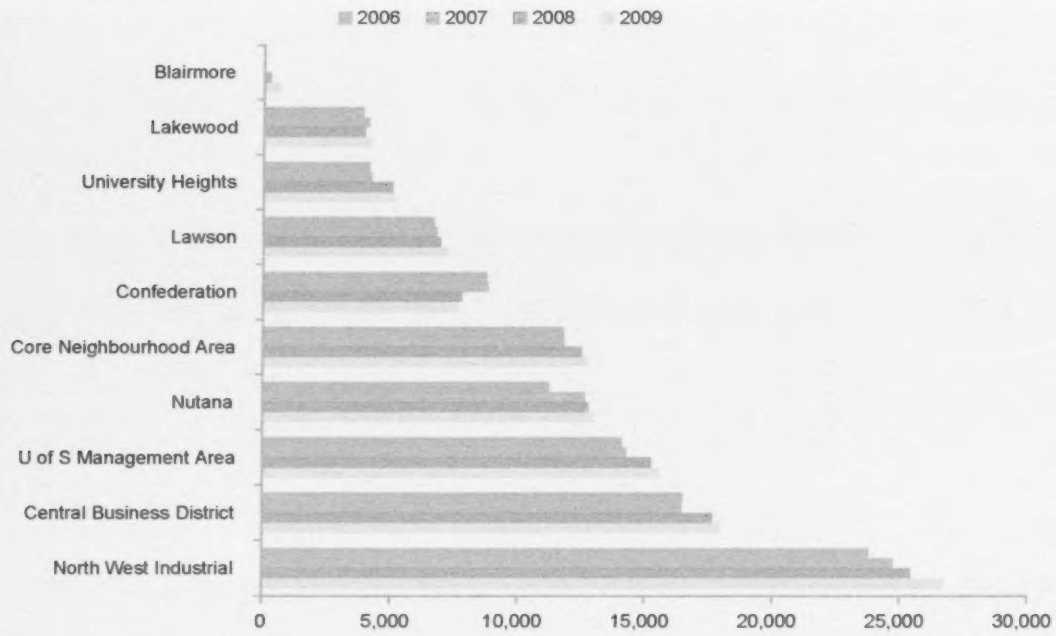
Employment has increased over the past four years in all suburban development areas, with the exception of Confederation. Employment significantly decreased in Confederation between 2007 and 2008 due to the closure of Maple Leaf Consumer Foods Inc. (formerly Mitchell's Gourmet Foods, a Division of Maple Leaf Consumer Foods Inc.), a meat processing facility employing 1,250 people. The University Heights, Nutana and North West Industrial suburban development areas have seen the greatest percentage increase in total employment since 2006. Employment by suburban development area from 2006 to 2009 is demonstrated in Figure 9.

The greatest percentage growth in employment since 2006 was in the University Heights suburban development area. There has been extensive commercial development in the University Heights Suburban Centre which has significantly contributed to the employment increase.

Also showing significant growth since 2006 is the Nutana suburban development area. Developments in the south end of the city, including the auto mall district in CN Industrial, and the big box retail development and business park in Stonebridge, have increased the number of employment opportunities considerably.

North West Industrial suburban development area has the highest proportion of Saskatoon's total employment and has experienced consistent growth from year to year. Total employment in this area has an average annual growth rate of 4%. As new development occurs in Marquis Industrial, it is expected that strong employment growth will continue in this suburban development area.

Figure 9: Employment by Suburban Development Area, 2006-2009



Source: City of Saskatoon, Business License Program, 2006-2009

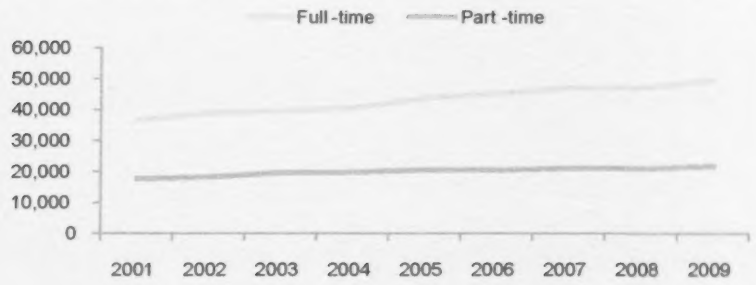
4.3 Full-time and Part-time Employment

Figure 10 illustrates full-time and part-time employment figures for licensed commercial businesses since 2001. (Employment data for institutional agencies is not included in this figure, as data was not available prior to 2006.) Over the years, part-time employment has remained relatively stable, while there has been a steady increase in full-time employment.

In analyzing the proportion of full-time to part-time employment in individual suburban development areas, the proportion of full-time employment has either increased or stayed the same in all areas except Confederation and Lakewood. As mentioned in the previous section, Maple Leaf Consumer Foods Inc. closed in the Confederation area between 2007 and 2008. In Lakewood, Minacs Worldwide Inc., a telephone call centre, closed in 2008.

Overall, the distribution of full-time and part-time employment between 2006 and 2009 has remained the same with 77% of total employment being full-time and 23% being part-time employment.

Figure 10: Employment of Licensed Commercial Businesses, 2001-2009

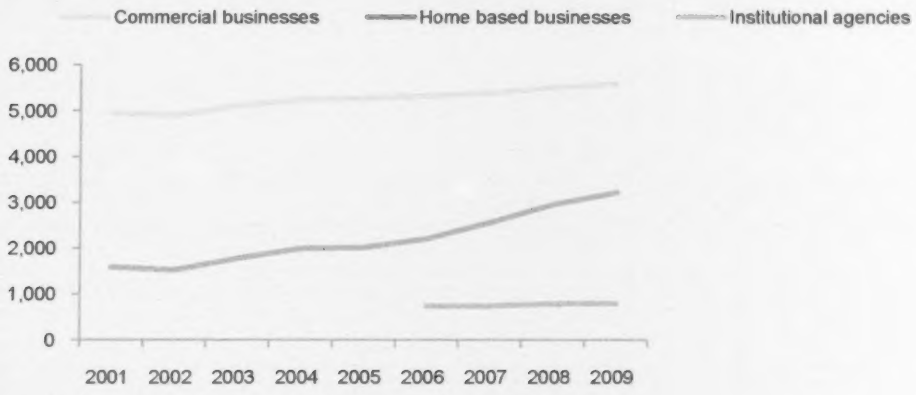


Source: City of Saskatoon, Business License Program, 2006-2009

4.4 Business Growth

Over the years, the number of commercial businesses, home based businesses and institutional agencies in Saskatoon has grown steadily. Since 2006, the total number of licensed businesses and institutional agencies has grown by 5%. Figure 11 illustrates the growth of commercial and home based businesses since 2001, and includes institutional agency figures beginning in 2006 when the Business License Program began collecting and tracking business statistics. The most notable trend emerging from the data portrayed in Figure 11 shows that the number of home based businesses is growing far more quickly than commercial businesses, increasing 46% since 2006.

Figure 11: Total Number of Licensed Businesses and Institutional Agencies, 2001-2009



Source: City of Saskatoon, Business License Program, 2006-2009

Home Based Business Growth

Often, a lack of financial capital or limited employment opportunities make operating a home based businesses a practical option, but there are several other reasons why people choose to run a business from home. Benefits and advantages that are not available in a conventional office environment can include cost-savings, personal freedom and reduced environmental impact.

The expense associated with increasing rents in commercial areas has encouraged growth in the home based business sector. Because it is less costly to maintain a home based business than a separate location, some existing businesses in commercial locations have moved to a home based setting. In addition, there are increasing numbers of new home based businesses. There is less risk associated with starting a home based business as initial expenses are greatly reduced by eliminating the need for a commercial location.

Personal freedom is an appealing feature of home based businesses. Working for yourself, setting your own work hours and not having to travel to work each day provides flexibility not usually found in a conventional office environment. Operating a business from home conveniently consolidates work, family and social life into one place which can result in a better quality of life.

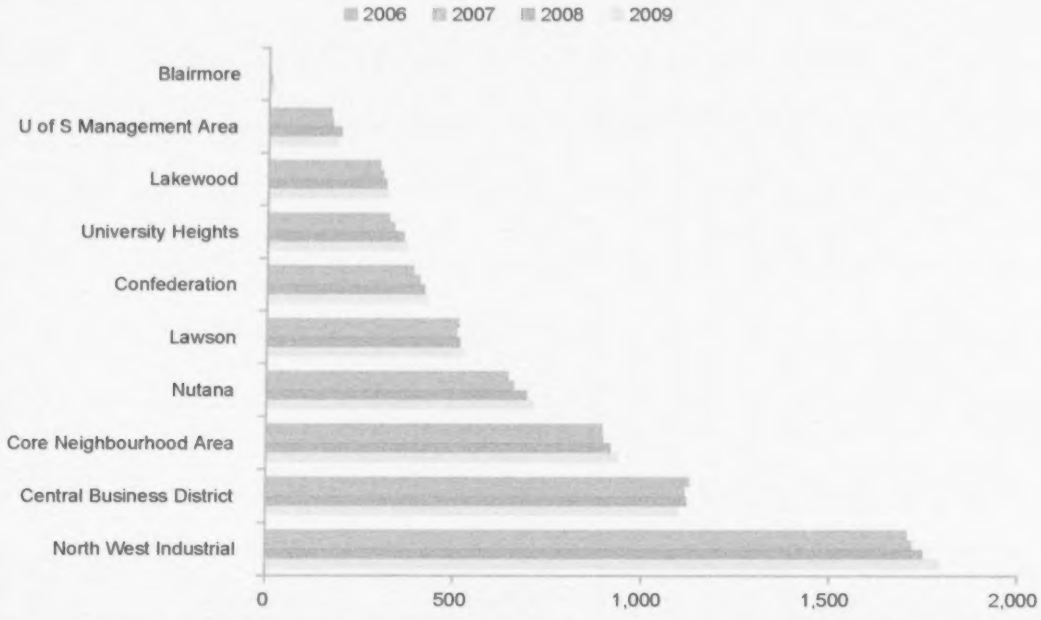
There are several environmental benefits realized by home based businesses. The continuing advancement of technology has significantly increased the opportunity to work from home by increasing efficiency and productivity, and reducing the need to travel, all while consuming fewer resources. Conducting business from home utilizes physical space and existing infrastructure which, in most cases, would otherwise remain vacant during the day. Home based businesses make less vehicle trips each day which reduces fuel consumption and carbon emissions, and causes less traffic congestion on roadways.

From a sustainability perspective, encouraging and accommodating home based business in Saskatoon is directly in line with the values outlined in the City of Saskatoon's Official Community Plan. Energy efficient planning practices, such as permitting home based businesses within the City's zoning regulations, ensure that land use needs are met in a sustainable way. Recognizing that not all types and scales of business are compatible with a residential neighbourhood, the City facilitates economic development and fosters entrepreneurship through home based businesses that are clearly secondary to the residential use of the property and compatible with the surrounding residential environment.

Businesses by Suburban Development Area

Since 2006, the number of businesses in each suburban development area has increased with the exception of the Central Business District. Although the number of businesses in the Central Business District has decreased by nearly 3% since 2006, employment in this area has increased by 9% over the same time period. The number of businesses by suburban development area from 2006 to 2009 is demonstrated in Figure 12.

Figure 12: Businesses by Suburban Development Area, 2006-2009



Source: City of Saskatoon, Business License Program, 2006-2009

5.0 Conclusion

Total employment in Saskatoon continues to grow from year to year, as does the city's population. As the workforce continues to grow, there is an increasing need to consider the population, economy and employment activity of the region as a whole. Understanding the trends throughout the region allows for improved growth management and sustainable development through the efficient use of land and placement of infrastructure. The Employment Profile has identified a number of trends.

- Although 85% of Saskatoon's employed labour force lives and works in Saskatoon, businesses located in the city rely on the labour force residing in communities in the surrounding area to commute to Saskatoon to fill employment opportunities.
- North West Industrial and Central Business District have the greatest number of businesses and approximately 40% of jobs in Saskatoon are located in these areas.
- Saskatoon's economy is rich in services-producing businesses and employment. The retail trade sector has the greatest proportion of total businesses and employment in Saskatoon.
- Small businesses are an important aspect of Saskatoon's growing economy. Seventy percent of commercial businesses in Saskatoon employ fewer than ten people. The continued growth of the home based business sector is further evidence of the strength of small businesses in Saskatoon.

Analyzing employment trends speaks directly to a community's needs by examining population, commuter flows, business size, industry sectors and geographic distribution independently and in relation to one another. Studying the movement of people within our city is a key element to understanding how our city should evolve both physically and economically. Gaining a better understanding of this process will guide Saskatoon into the future in a more efficient and effective manner.

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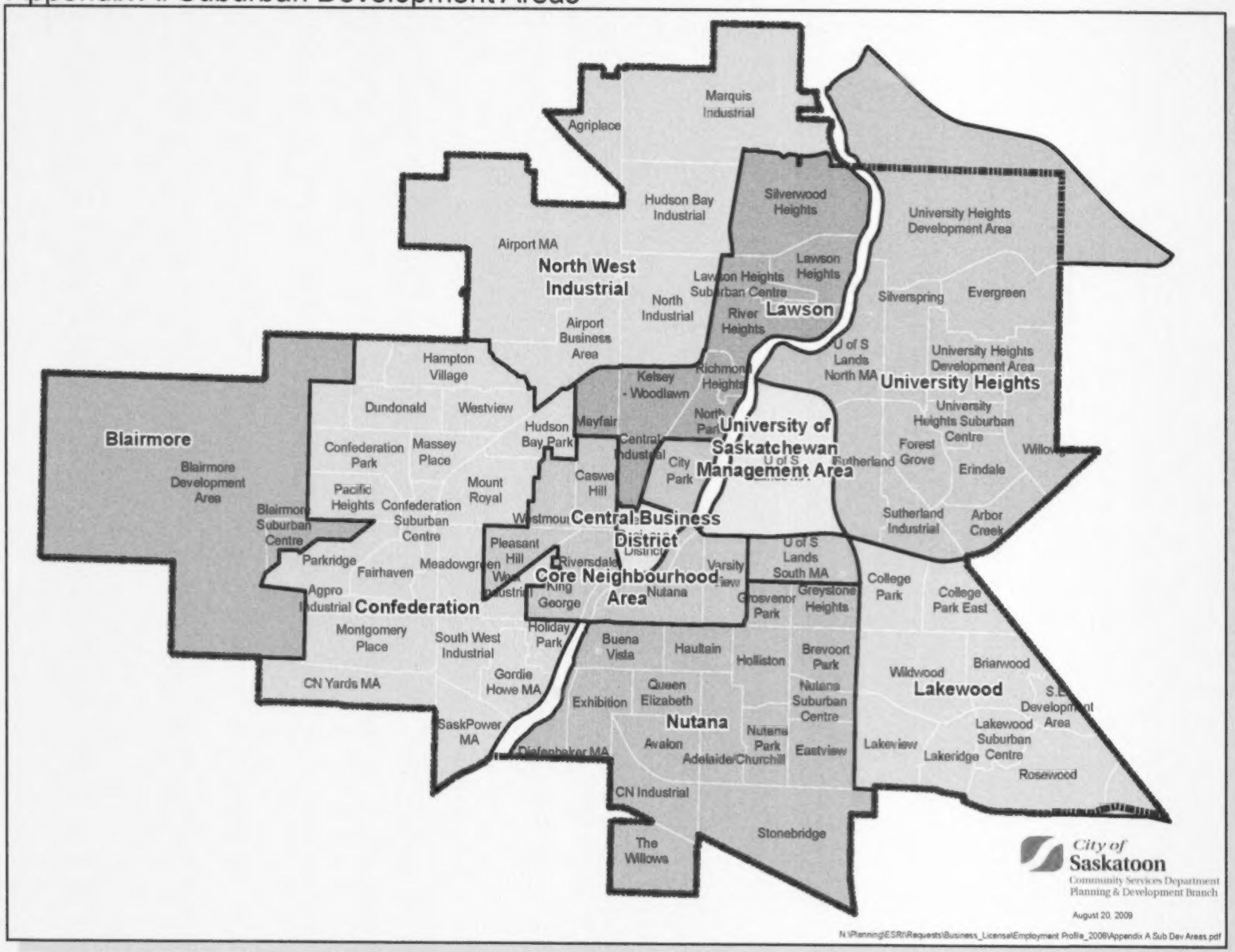
Appendix A: Suburban Development Areas



Appendix B: Employment Density by Neighbourhood, 2006

Suburban development area	Neighbourhood name	Gross density		Net density	
		Employees per hectare	Employees per acre	Employees per hectare	Employees per acre
Blairmore		**0.0**	**0.0**	**0.0**	**0.0**
	Blairmore Development Area	0.0	0.0	0.0	0.0
	Blairmore Suburban Centre	0.0	0.0	0.0	0.0
Central Business District	**Central Business District**	**141.0**	**57.0**	**369.4**	**149.5**
Confederation		**3.66**	**1.48**	**34.2**	**13.84**
	Parkridge	3.6	1.5	92.5	37.4
	Hudson Bay Park	6.5	2.6	75.9	30.7
	Confederation Suburban Centre	21.7	8.8	63.2	25.6
	South West Industrial	18.7	7.6	55.6	22.5
	Confederation Park	1.1	0.4	54.0	21.9
	Pacific Heights	0.8	0.3	42.4	17.2
	Dundonald	1.0	0.4	42.2	17.1
	Mount Royal	3.8	1.5	40.1	16.2
	Westview	0.6	0.2	37.4	15.1
	Meadowgreen	1.0	0.4	33.1	13.4
	Massey Place	1.1	0.5	32.7	13.2
	Agpro Industrial	2.4	1.0	32.5	13.1
	Fairhaven	0.8	0.3	27.0	10.9
	Holiday Park	1.7	0.7	23.4	9.5
	Montgomery Place	0.2	0.1	17.2	7.0
	West Industrial	7.5	3.1	14.0	5.7
	SaskPower MA	0.1	0.0	0.4	0.2
	CN Yards MA	0.1	0.0	0.3	0.1
	Gordie Howe MA	0.5	0.2	0.0	0.0
	Hampton Village	0.0	0.0	0.0	0.0
Core Neighbourhood Area		**11.79**	**4.76**	**104.61**	**42.34**
	Pleasant Hill	19.1	7.7	179.6	72.7
	City Park	33.0	13.4	160.4	64.9
	Nutana	6.6	2.7	138.8	56.2
	Varsity View	6.4	2.6	88.7	35.9
	Westmount	3.8	1.5	83.3	33.7

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Suburban development area	Neighbourhood name	Gross density		Net density	
		Employees per hectare	Employees per acre	Employees per hectare	Employees per acre
	Caswell Hill	10.4	4.2	77.6	31.4
	Riversdale	13.4	5.4	69.7	28.2
	King George	1.6	0.6	38.8	15.7
Lakewood		**2.04**	**0.86**	**31.33**	**12.68**
	Wildwood	6.3	2.6	96.3	39.0
	College Park	9.1	3.7	80.0	32.4
	Lakeview	1.6	0.7	52.2	21.1
	College Park East	0.7	0.3	28.5	11.5
	Lakeridge	0.6	0.3	24.2	9.8
	S.E. Development Area	0.1	0.1	0.8	0.3
	Briarwood	0.0	0.0	0.0	0.0
	Lakewood Suburban Centre	0.0	0.0	0.0	0.0
	Rosewood	0.0	0.0	0.0	0.0
Lawson		**7.53**	**3.07**	**35.44**	**14.33**
	Mayfair	6.7	2.7	82.8	33.5
	River Heights	1.5	0.6	50.1	20.3
	Central Industrial	25.9	10.5	47.6	19.3
	Kelsey - Woodlawn	11.5	4.7	43.4	17.6
	Lawson Heights Suburban Centre	19.4	7.9	40.6	16.4
	Lawson Heights	0.4	0.2	18.4	7.4
	Richmond Heights	0.5	0.2	16.1	6.5
	North Park	1.2	0.5	13.7	5.5
	Silverwood Heights	0.7	0.3	6.3	2.5
North West Industrial		**12.95**	**5.23**	**27.83**	**11.23**
	Airport Business Area	23.5	9.5	72.5	29.3
	North Industrial	25.3	10.2	37.3	15.1
	Hudson Bay Industrial	15.8	6.4	27.0	10.9
	Agriplace	9.4	3.8	16.2	6.5
	Marquis Industrial	2.9	1.2	13.2	5.3
	Airport MA	0.8	0.3	0.8	0.3
Nutana		**5.98**	**2.43**	**43.95**	**17.78**
	Grosvenor Park	17.2	7.0	121.0	49.0
	Greystone Heights	11.1	4.5	96.0	38.8
	Brevoort Park	10.7	4.3	94.7	38.3
	Holliston	9.6	3.9	90.9	36.8
	Buena Vista	3.4	1.4	69.4	28.1
	Nutana Suburban Centre	22.5	9.1	48.5	19.6
	Avalon	1.3	0.5	35.2	14.2

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Suburban development area	Neighbourhood name	Gross density		Net density	
		Employees per hectare	Employees per acre	Employees per hectare	Employees per acre
	Nutana Park	1.1	0.5	32.4	13.1
	Eastview	1.2	0.5	31.4	12.7
	Haultain	1.9	0.8	31.0	12.5
	CN Industrial	13.2	5.3	28.8	11.7
	Adelaide/Churchill	1.1	0.5	26.4	10.7
	Queen Elizabeth	1.7	0.7	24.5	9.9
	Exhibition	5.5	2.2	12.9	5.2
	Stonebridge	0.2	0.1	4.1	1.7
	Diefenbaker MA	0.0	0.0	0.0	0.0
	The Willows	0.0	0.0	0.0	0.0
University Heights		**4.64**	**1.88**	**23.4**	**9.46**
	Sutherland	2.5	1.0	56.1	22.7
	Forest Grove	0.8	0.3	32.7	13.2
	Erindale	0.7	0.3	30.0	12.1
	Sutherland Industrial	15.4	6.2	23.2	9.4
	University Heights Suburban Centre	8.1	3.3	23.3	9.4
	Silverspring	0.4	0.2	20.4	8.3
	U of S Lands North Management Area	1.1	0.4	11.0	4.4
	University Heights Development Area	0.1	0.0	2.2	0.9
	U of S Lands South MA	0.2	0.1	0.6	0.2
	Arbor Creek	0.0	0.0	0.0	0.0
	Evergreen	0.0	0.0	0.0	0.0
	Willowgrove	0.0	0.0	0.0	0.0
U of S Management Area	**U of S Management Area**	**28.3**	**11.5**	**84.7**	**34.3**
City-wide average		**7.4**	**3.0**	**43.4**	**17.6**

Appendix C: Businesses with 300+ Employees, 2006

Business name	Street address	Suburban development area
Businesses with 1000+ employees		
Mitchell's Gourmet Foods, A Division of Maple Leaf Consumer Foods Inc.	3003 11th St W	Confederation
Royal University Hospital	103 Hospital Dr	U of S Management Area
Saskatoon City Hospital	701 Queen St	Core Neighbourhood Area
St. Paul's Hospital	1702 20th St W	Core Neighbourhood Area
University of Saskatchewan	101 Administration Pl	U of S Management Area
Businesses with 500-999 employees		
CNH Saskatoon	1000 71st St E	North West Industrial
GC Teleservices Canada Corp.	2600 Koyl Ave	North West Industrial
Mitchell's Gourmet Foods, A Division of Maple Leaf Consumer Foods Inc.	100 McLeod Ave	Confederation
Parkridge Centre Special Care Home	110 Gropper Cres	Confederation
Provincial Government Offices (Various)	122 3rd Ave N	Central Business District
Saskatoon Public Health Services (Main Office)	101 310 Idylwyld Dr N	Central Business District
SIAST Kelsey Campus	1130 Idylwyld Dr N	Lawson
Businesses with 300-499 employees		
Cameco Corporation	2121 11th St W	Confederation
Canada Revenue Agency	340 3rd Ave N	Central Business District
Cover - All Building Systems	3815 Wanuskewin Rd	North West Industrial
City of Saskatoon City Hall	222 3rd Ave N	Central Business District
Federated Co-operative Ltd.	401 22nd St E	Central Business District
Hitachi Canadian Industries Ltd.	826 58th St E	North West Industrial
Minacs Worldwide Inc.	3510 8th St E	Lakewood
SaskTel	140 1st Ave N	Central Business District
SaskTel	446 2nd Ave N	Central Business District
Saskatoon Police Service Headquarters	130 4th Ave N	Central Business District
Saskatoon Prairieland Park Corp.	503 Ruth St W	Nutana
Saskatoon Transit Services	236 23rd St E	Central Business District
Sherbrooke Community Centre Special Care Home	401 Acadia Dr	Lakewood
The Commissionaires	493 2nd Ave N	Central Business District
The Real Canadian Superstore	2901 8th St E	Nutana
The Real Canadian Superstore	411 Confederation Dr	Confederation
Western Grocers/Westfair Foods	302 Melville St	Nutana

Note: The businesses in this table are those with 300 or more employees as illustrated in Map 6. The table and map do not include businesses with a combined total of 300 or more employees in multiple locations across the city.

Appendix D: North American Industry Classification System (NAICS)

NAICS is a comprehensive system of categorizing businesses developed by the statistical agencies of Canada, the United States, and Mexico to provide a common reporting standard for economic activity across North America (Statistics Canada 2007a). Its hierarchical structure consists of 20 sectors, 102 sub-sectors, 324 industry groups, 718 industries and 928 national industries. All licensed businesses and institutional agencies have been assigned a NAICS national industry code based on their primary business type or activity. The reporting in this document uses groupings of the 20 sectors. Each sector is briefly described below. For more detail, please visit the Statistics Canada website at www.statcan.gc.ca.

NAICS Sector 11 – Agriculture, Forestry and Fishing
This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities. Establishments primarily engaged in agricultural research or that supply veterinary services are not included.

NAICS Sector 21 – Mining, Oil and Gas Extraction
This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids (such as coal and ores), liquids (such as crude petroleum), and gases (such as natural gas). Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included.

NAICS Sector 22 – Utilities
This sector comprises establishments engaged in operating electric, gas and water utilities. These establishments generate, transmit, and distribute electric power; distribute natural gas; treat and distribute water; operate sewer systems and sewage treatment facilities; and provide related services, generally through permanent infrastructure of lines, pipes and treatment and processing facilities.

NAICS Sector 23 – Construction
This sector is engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract. Establishments often subcontract some or all of the work involved in a project; or work together in joint ventures.

NAICS Sectors 31-33 – Manufacturing
This sector comprises establishments engaged in physical or chemical transformation of materials or substances into new products. These products may be finished (ready for use or consumption), or semi-finished (raw materials ready for another establishment to further manufacture). Related activities, such as assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat treating, plating and similar operations are included.

NAICS Sector 41 – Wholesale Trade
This sector is engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are organized to sell merchandise in large quantities to retailers, and business and institutional clients.

NAICS Sectors 44-45 – Retail Trade
The retail trade sector includes establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise to the general public.

NAICS Sectors 48-49 – Transportation and Warehousing
The transportation and warehousing sector comprises businesses engaged in transporting passengers and goods, warehousing and storing goods, and providing services to these establishments. National post office and courier establishments, which also transport goods, are included in this sector.

NAICS Sectors 52-53 – Finance, Insurance, Real Estate and Leasing

NAICS Sector 52 – Finance and Insurance
This sector comprises establishments engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions.

NAICS Sector 53 – Real Estate and Rental and Leasing
This sector comprises establishments engaged in renting, or leasing tangible or intangible assets. Establishments included are those primarily engaged in managing real estate for others; renting and/or buying of real estate for others; and appraising real estate.

NAICS Sector 54 – Professional, Scientific and Technical Services
The individual industries of this sector are defined on the basis of their particular expertise and training. The main components of this sector are legal services, accounting and related services, architectural, engineering and related services, surveying and mapping, design services, management, scientific and technical consulting, scientific research and development industries, and advertising services.

NAICS Sectors 55-56 – Business, Building and Other Support Services

NAICS Sector 55 – Management of Companies and Enterprises
This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

NAICS Sector 56 – Administrative and Support and Waste Management

This sector comprises two different types of establishments: 1) those primarily engaged in activities that support the day-to-day operations of other organizations, such as administration, hiring and placing personnel, preparing documents, arranging travel, providing security and surveillance and cleaning buildings; and 2) those primarily engaged in waste management activities, such as the collection, treatment and disposal of waste material, the operation of material recovery facilities, and the remediation of polluted sites.

NAICS Sector 61 – Educational Services

This sector is engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

NAICS Sector 62 – Health Care and Social Assistance

This sector is engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring assistance.

NAICS Sectors 51 and 71 – Information, Culture and Recreation

NAICS Sector 51 - Information and Cultural Industries

This sector comprises establishments engaged in creating and distributing information and cultural products. The sector includes publishing industries, including software publishing, motion picture and sound recording, broadcasting, telecommunications, data processing, and the other information services, including Internet publishing and broadcasting and web search portals.

NAICS Sector 71 – Arts, Entertainment and Recreation

This sector is engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce or promote live performances or events intended for public viewing; provide the artistic, creative and technical skills for live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement and leisure-time interests.

NAICS Sector 72 – Accommodation and Food Services

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, resorts, motels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps. This sector also comprises of establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises.

NAICS Sector 81 – Other Services

This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating various social and political causes, and promoting the interests of their members.

NAICS Sector 91 – Public Administration

This sector comprises establishments primarily engaged in the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them. Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

Ownership is not a criterion for classification. Government owned establishments engaged in activities that are not governmental in nature are classified to the same industry as privately owned establishments engaged in similar activities.

Government establishments may engage in a combination of governmental and non-governmental activities. When separate records are not available to separate the activities that are not governmental in nature from those that are, the establishment is classified to this sector.

NOTES